

Background: ARP1 owner/resident 36 years, 3 children, 6 grandchildren. Born/raised Washington DC, Washington Post carrier, President high school bank, “Bunker Hill Pharmacy” soda jerk. USAF 4 years, manager Thule AFB Officer’s club theater. Agent/Consultant Metropolitan Life, president’s club member (sale of \$750,000.00 or more per year). “1st in class” AT&T Personnel Assessment Program, promoted to manager. US Commerce Department senior systems analyst, USMC Quantico Officer’s club member, Mason, Bachelors in Business Administration, purchased failing sandwich shop made profitable in 6 months opened 3 more, sold stores at profit before moving to PA. Colonial Penn Group, Director Data Management. Senior level technology positions and Change Agent for fast evolving technologies world, Board elected Officer of Company, Alexander & Alexander, American Express, Allied Signal. Retired from Honeywell International as Global Sourcing Director (30 years’ experience in procurement and contract negotiation).

Arrowhead Ranch HOA: Joined ARP1 HOA Landscape Committee 9/20, presented plan to outsource Christmas lighting to contractor, managed selection process negotiated contract ARP1 Christmas lights. Elected to HOA Board 3/21. Managed selection process negotiated contract ARP1 management company. ARP1 Board Director 3/21-3/24.

In addition to my formal education, I had some “training” sessions while employed that helped provide further insight into myself and how/why I operate the way I do.

AT&T Personnel Assessment Program (PAP): An intensive two week, off site, evaluation session where the participants are put in management situations and are measured on their performance in how they handled the situation and how well they picked up on nuances imbedded in process that controlled results. Less than a month after having attended the session, I was promoted to first level management; 1st in my class.

Myers/Briggs: Introduction to Type: America Express was all about collaboration which required people working closely together. In order to help accomplish their team concepts America Express used the services of Myers/Briggs. Myers/Briggs, consulting psychologists, developed questionnaires to be used to make “Jung’s theory of psychological types understandable and useful in everyday life, helping each participant better understand themselves, their motivations, and strengths.” Attending the sessions together, the work teams would also learn how to interact with their teammates by better understanding them and their drivers. According to the Myers/Briggs study, I am an: Extraversion, N Intuition, Thinking, Perceiving (ENTP). This maps well with my natural “deductive reasoning” thought process helping to explain why technologies was the perfect field for me.

Malcolm Baldrige: “The principles he championed — managing for innovation, entrepreneurship, customer-driven excellence, integrity, visionary leadership, creating value, agility, societal responsibility, and a focus on the future — became known as the Baldrige Principles. The act provides the framework for performance excellence, management, organization quality and ongoing improvement.” At Allied Signal (now Honeywell International Inc.) all of management was required to earn a “Green Belt” in understanding and implementing the Baldrige Principals. Once completed for management, the training process was then implemented for the rest of Allied Signal staff. I earned my Green Belt early. The Baldrige Principals became the standard on which performance was based and graded. The Malcolm Baldrige Award is a coveted prize rewarding corporation excellence.

My HOA Board experience is similar to one of my former employers who had an eight percent (8%) annual turnover rate in their technologies organization. Eight percent is good, as you are bringing in new people, with different yet proven experience, the intent being to infuse your staff with individuals who are in tune with the constantly changing world we live in; change is constant. Unfortunately, the turnover was the same eight percent each year, in that the new arrivals from one year were leaving after their first year of employment; they were frustrated. The company was never getting the benefit of the new talent because their “culture” was impenetrable. They hired a consultant (McKinsey and Associates), established a totally new

technologies organization structure with all new position descriptions. They then gave all of technologies management, below vice president, sixty (60) days' notice ("intent to terminate"). None of the new position descriptions were a direct match to what had existed; therefore, no one was grandfathered into the "new" organization. They provided outplacement services based on rank/longevity for those displaced and moved forward. Perhaps this seems harsh but "culture change" is not easy. You cannot accomplish the required change by "tinkering"; drastic action is required. Our HOA Board is in dire need of a "culture change".

I have outlined below items that I proposed while a Board member showing action the Board took, if any.

1. As a member of the Landscape Committee, one evening coming home from a trip to Scottsdale, I noticed that someone had draped a string of Christmas lights over the monument on the north side of the 67th Avenue and Utopia entrance. No other entrance had any Christmas lights. At the next Board meeting, as a Homeowner member of the Landscape Committee, I suggested that the Board consider hiring a local contractor to provide a Christmas lighting proposal for all monument entrances. The Board was not aware such businesses existed. I got their permission to develop a Request for Proposal (RFP), engage some contractors using the RFP process and select a contractor. My plan was simple, the contractor would provide a lighting proposal, with pictures of what their design would look like, and if selected they would buy the equipment needed to implement their proposal (HOA would reimburse), install their proposal at the monuments at the beginning of the "lighting season", remove the lighting at the end of the "lighting season" and store the equipment till the following year's lighting season. The next year they would test the equipment that was stored, make any repairs and any changes requested by the HOA and then repeat the install, deinstall, storage, repair and install process year after year. The HOA would pay for the installation, removal and storage year over year and for any repairs or added equipment the next year. I determined who the contractor would be (RFP process) and developed the contract for signature. Plan was adopted.
2. Through limited research (review of BBB website) I determined that the then Landscape Company (Agave) did not have a required license to perform irrigation services for residential properties. The company was performing so poorly that there were several discussions among the Board of firing the company. Instead of firing the company for shoddy performance, one Board member was promoting the failing company to other Arrowhead Ranch HOAs who also hired them. The company performed irrigation services on our property for more than a year without a residential license to do so. Instead of telling Agave to get the license, the President and management company representative kept trying to find ways to make them "look" legal. This not only put our City Park at risk, we were in violation of the law. In our recent Annual Meeting, the Board President said that "the landscape company fired ARP1". Based on their performance and lack of a proper license, they should never have been around long enough to control their exit.
3. The same Board member that was "promoting" Agave to other HOAs is responsible for using the "common area" landscape company to clean up his lake using "common area" funds (1530 Homeowners assessments). Hanson lake is the only property in our community that

meets the criteria stated in the Master Declarations of Covenants, Conditions, Restrictions (CC&Rs) Article XVII Certain Limited Use Areas and Limited Use Area Assessments, Section 2 Maintenance and Limited Use Area assessments Lien. Which states; “As the sole source of funds to pay for Association maintenance of such Limited Use Areas, however, the Board shall assess the Owners and all lots having rights of use of the Limited Use Areas, in addition to all other assessments against such owners and lots, annual and special assessments related to such Limited Use Areas.” What this means is that the people living around Hanson Lake should be paying an additional assessment for maintaining their lake which the rest of us have no access to and can be prosecuted for Trespassing if we enter the area. The Board member who lives on the lake clearly stated on page 4 of the June 2022 newsletter the exact words that make his lake a “limited access area”. When I broached the subject with the President he said “S___ likes to keep his lake pristine”. Though the Board has also been made aware of this, no action has been taken to correct the matter.

4. In continuation of this theme, the Board has sent letters to the Homeowners whose walls back up to some of the “common areas” telling the Homeowners that they, “Homeowner”, are responsible for maintaining their part of the contiguous walls that run the length for several homes and face “common areas” (Utopia Road 67th Drive to 71st Avenue Kiosk Park, etc.). If each Homeowner is responsible for a segment of the contiguous wall, stucco maintenance and painting, and they choose paint from a different company (same color different tint, lesser quality, etc.) it could be disastrous. It defeats our intent to maintain a common upscale look and feel to our community. If they are not adept at stucco maintenance the community loses the “common” upscale look. The HOA has maintained those walls since the community was founded and the HOA should continue such maintenance. The common area walls have been in need of repair and painting for a couple of years now and areas along Utopia Road, 71st Avenue and 68th Drive show the neglect. What about the Homeowners whose property backs up to 67th Avenue, 75th Avenue, Union Hills Drive, etc. are they responsible for those exterior walls? **Why would the Board allow “common area funds” to be used for maintenance of “Limited Use Areas” in one case (paragraph 3 above) and then cause “common areas” to be the responsibility of individual homeowners in another?**
5. I proposed that the entrance at 73rd Avenue and Union Hills be updated to the same signage as all other entrances using original 2019 proposal from TSG sign company. In the open session of a Board meeting, when I requested that the HOA upgrade the signage, the President said he “likes the old signage”, and the proposal was dropped. Signage at 73rd and Union Hills, by the elementary school, is the original 40-year-old signage. The Board spent more than \$300,000.00 for the monuments, installation and two iterations of landscaping, but excluded the entrance at 73rd Avenue and Union Hills which is next to the elementary school.
6. The Board does no planning. As an example, the assessment increase last year was a simple brief discussion between the Treasurer and President in an Open Session of the Board meeting. When the issue was raised, I asked “What is the plan?” At that the President turned to the Treasurer and Treasurer said “electricity went up ten percent (10%)”. The

President then said “OK ten percent (10%), twenty dollars (\$20) every six months”. The ARP1 pays about twenty thousand dollars (\$20k) for electricity each year (budget). Ten percent (10%) of twenty thousand dollars (\$20k) is two thousand dollars (\$2k). The electricity increase of two thousand dollars (\$2k) divided by the number of Homeowners (1530) is \$1.31 per homeowner per year. How does that justify a forty-dollar (\$40) per year increase per Homeowner or sixty-one-thousand-dollar (\$61k) total for the community per year? The way it should have worked is that the President would request that the Treasurer research and determine what, if any, increase is needed which the Board would approve, or not, based on the proposed research/plan. Prior to the Open Session Board meeting, the President had been promoting an increase using other HOA increases as the standard; “they do it we should do it”. What is the plan? There was no plan.

7. Vendor selection is problematic. In the last two landscape vendor selection processes, the vendors selected were not the best fit for the job. All of the proposed vendors have been in business for about thirty (30) years. Three are small companies, local to the valley (Phoenix), though two of them have small branches in other states. The fourth company started out in California as a small local family-owned company. They have grown from their small local roots to number five (5) in the country with \$300,000,000.00 in annual revenue. They operate in four states all close to Arizona. They employ more Arizona residents in their “local operation” than the other three (3) companies combined. Their Arizona resident/employees own property, attend our schools, shop at stores, pay taxes, and support our “local” economy. Their Arizona operation is locally managed. When it comes to major projects, like planting sixty (60) trees or knowing the ins and outs of irrigation systems, they have enough “local” personnel trained to handle the project and can move their “local” personnel around, within our community, to get the job done in a relatively short time frame. Having owned and grown two businesses and then sold them profitably, I can tell you that only companies that depend on teamwork from “local” dedicated personnel, and who maintain high customer service ratings will survive. “The Board President insisted on a “local” company, whatever that means to him, consequently, the successful company with a good reputation was not selected. Pricing was NOT an issue.
8. The Board election held this year (2024) is questionable at best. The over whelming majority of votes were cast at the Annual Meeting; approximately 80 Homeowners were present. Only a hand full of votes were cast through the CPM electronic system. This means that roughly 5% of the property owners (80/1530) determined who would govern our community. Consequently, it appears that 95% (1450) of the property owners (Homeowners) don’t care about how the community is managed. We have had the same President for 10 years. There is some question, yet to be resolved, about why there were so few votes from the other property owners.

The President was up for reelection in February 2023. He stated, publicly distributed documents, that he owns “Cramer Realty”. However, the public database record of his Real Estate License (SA026221000) shows that he has been employed by “Cramer and Associates” since 7/1/1995. Marjorie Cramer, a Broker and his mother, is the principal of “Cramer and Associates”. I could not find a “Cramer Realty” licensed in Arizona (state public database). It seems at least misleading? To further complicate the matter, he also uses

“Cramer Real Estate” which is a company whose license (SE010687000) was terminated 1/31/1995.

9. Sixty (60) trees were contracted for by the Board without any planning. The first job for the Landscape Committee which I joined when it was formed (9/20) was to determine where the sixty trees were to be planted and place little blue flags around the community marking the spots. Because there was no planning up front (where, how many, what type, (deciduous/ever green), etc.) trees were placed willy nilly throughout the community; among the stand of pines running along Utopia Road from 67th to 75th Avenues, etc. Several of the trees had died and had been removed (67th Avenue, Utopia Road, etc.) a year before the HOA President praised the new additions in the June 2022 Newsletter. Most of the trees planted along Union Hills Drive died and were removed because the irrigation system along Union Hills from 68th Drive to 71st Avenue was off for eighteen months before the landscape company discovered the error. That is also why the grass along Union Hills has been brown for the same period of time. The trees and grass were not getting any water. It should be noted that the city of Glendale had the irrigation system off from October 2020 thru February 2021 in order to place a liner in the sewer along Union Hills Drive. The trees were planted after the city had completed their project and the irrigation system could have been turned on, but wasn't. It was left off by the former landscape company from February 2021 to August 2021 while the landscape company waited to “charge” the system. It was then turned off again in October 2021 for over seeding. The former landscape company contract was not renewed and they left December 31, 2021. The new landscape company discovered the water was still off in April 2022 and then restored it. Regarding the trees, twenty (20) of those died (1/3) and were removed. They died due to lack of water, most notably along Union Hills Drive, 67th Avenue and 75th Avenue. Several of those trees died and were removed one year before the accolades were reported in the June 2022 newsletter.
10. Proposed purchasing a projector and screen (\$250) so that Homeowners attending Board meetings could see the documents Board members were reviewing during the Open Session of Board meetings. I have a Kodak projector (pocket size) that I used as an example. President rejected. In reality the Board meetings are scheduled for times (5PM and 6PM) that most people would be just getting home from work or sitting down for dinner. Even though the meetings are scheduled for the second Tuesday of the month, “all” Homeowners should be reminded when the monthly meeting approaches; notice to each individual not just a sandwich board posted at two entrances and Eblasts to some. They are also not well publicized so that Homeowners know when to attend or exactly what the topics will be (generalized category only). Homeowners rarely come to Board meetings unless they are questioning an Architecture decision. The Board meetings are not designed to accommodate the Homeowner but rather to dissuade the Homeowner from attending.
11. I proposed hiring the engineering company (Civil Engineers) that planned and established the original irrigation systems for Arrowhead Ranch communities and got a proposal to review our system and recommend improvements (\$4k). I believe that adding a filter to the intake or raising the intake pipe within the lake would reduce the amount of debris that enters the system (reclaimed water is moved from lake to lake in order to provide the water for irrigation). Our irrigation system gets clogged with snail shells and other debris from the

lakes and requires routine manual flushing. The problem is that the Board relies on the landscape company to have the expertise needed to plan/design large scale irrigation systems; a civil engineering responsibility. As an example, the current landscape company has fourteen (14) irrigation workers, only four (4) are certified (trained). If you equate this to the plumbing profession (Apprentice, Journeyman, Master) we have four (4) Journeymen hopefully, closely supervising, ten (10) Apprentices. Hardly the expertise needed to plan and implement major changes. In reality, it is not in the best interest of the landscape company to provide a permanent irrigation solution, even if they had the expertise to do so, as they make more money constantly repairing the existing system

12. I proposed developing a Charter (roles and responsibilities) for the Landscape Committee when it was formed. The President didn't like the idea. Consequently, there is no plan and the Committee has no clout. The CC&Rs specifically state that the committees "shall have all of the power of the Board"; they should be able to operate independently. All interaction with the landscape company is conducted by the President or management company rep. The President is also heavily involved in Architectural Committee decisions even though the group has a chairperson and the criteria is clearly identified in the founding documents.
13. Proposed using a "Landscape Architect" (a four-year college degree program, ASU, U of A) for the second iteration of Monument landscaping, gained Board approval, and engaged a Landscape Architect (no dollar commitment). HOA President ended the effort and had the then current landscape company design and implement landscaping. This was the same company that did the first iteration of landscaping. The company did not have a Landscape Architect on staff or hire such services for the effort. At a Board meeting when I asked the company owner who his Landscape Architect was, he answered "me" meaning himself; he is not a Landscape Architect. The landscape company owner was not prepared with pricing at the Board meeting, consequently, our President, Management Company representative and one other Board member actually determined what would be needed and did the pricing during the Board meeting. Among the problems with the pricing; they had not considered removing the rocks that were in the area or restaging the pots. Since those things were not priced the landscape owner didn't do them. In discussions among the Board, it had been decided that the Bougainvillea, which dominate the monuments, would be removed and placed at other areas around the community property. This also did not happen. ARP1 is a planned area development (PAD) and as such was planned by Civil Engineers and Landscape Architects. We should have a comprehensive landscaping (Landscape Architect) plan for ARP1 and not be installing the landscape companies one off "sale of the day" proposals.